

Digital Asset Wallet for Salesforce

Web3 Enabler

User Guide v0.1



Preface

Web3 Enabler Digital Asset Wallet for Salesforce is an app that integrates digital asset wallets with Salesforce Financial Services Cloud to allow financial planners to normalize crypto trading in their existing business processes.

Administrators or financial advisors do not need to be Web3 knowledgeable to use Digital Asset Wallet for Salesforce.

We urge Salesforce Administrators to read through this entire document at least twice. If you are new to Web3, some of the details may be unfamiliar to you. If you are experienced with Web3, you may find some of the simplifications we make in the interface shocking. We have focused on making the process as accessible as possible for individuals with all levels of blockchain and crypto understanding.

Table of Contents

[Preface](#)

[Table of Contents](#)

[Overview](#)

[Quick Start Guide](#)

[Prerequisites](#)

[Installation](#)

[Troubleshooting](#)

[Administrators Guide](#)

[Post-Installation Setup and Authorization](#)

[Digital Asset Wallet User Guide](#)

Overview

This user guide outlines the processes to install, configure, and use Digital Asset Wallet for Salesforce.

This user guide provides the basic tools to understand and operate Digital Asset Wallet for Salesforce rather than advanced solutions.

Purpose

This is a resource for your organization's Salesforce administrators and users as well as financial advisors departments handling crypto Financial Holdings to understand the Digital Asset Wallet for Salesforce mechanics and network connection methods. Additionally, potential risks are noted and possible mitigation practices are suggested. This guide also

allows users to refresh on their roles or terminology as well as troubleshooting common errors that may arise.

Quick Start Guide

Prerequisites

- A valid Financial Services Cloud license and installation in your Salesforce org
- Administrator access to the org

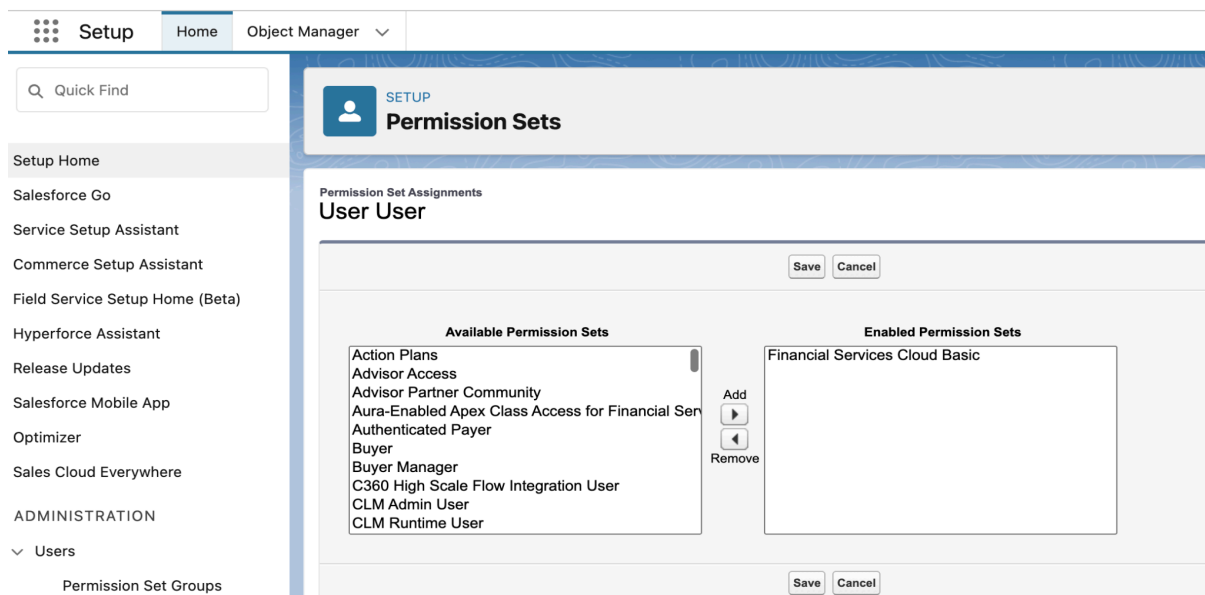
Installation

1. Verify Financial Services Cloud Installation

- Ensure FSC is installed and enabled in your org. Contact your Salesforce administrator if confirmation is needed.
- Check for FSC objects (e.g., Financial Account) in **Setup > Object Manager** to confirm installation.
- **Note:** FSC must be installed separately prior to proceeding.

2. Assign Financial Services Cloud Basic Permissions

- In Salesforce Setup, go to **Users > Permission Sets**.
- Assign the **Financial_Services_Cloud_Basic** permission set to your user.
- **Note:** This standard FSC permission set must be assigned via the Salesforce UI.

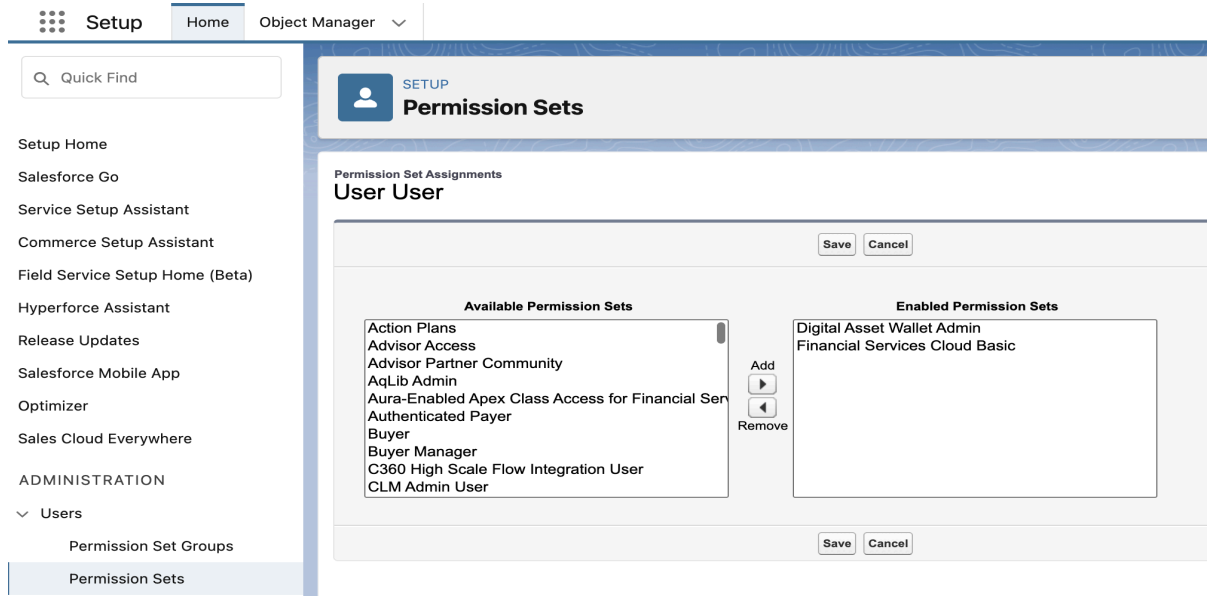


- Go to Setup -> Users -> Assign the "Financial Services Cloud Basic: Permission Set

3. Install the Digital Asset Wallet from AppExchange

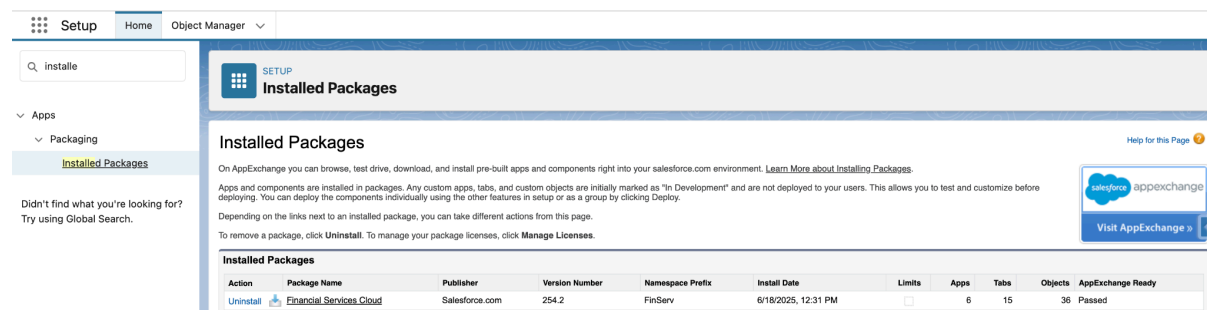
- Navigate to the Salesforce AppExchange and search for "Digital Asset Wallet for Salesforce."

- Click **Get It Now**, select your org, and follow the installation wizard to complete the process.
4. **Assign Digital Asset Wallet Admin Permissions**
- In Salesforce Setup, navigate to **Users > Permission Sets**.
 - Locate and assign the **Digital_Asset_Wallet_Admin** permission set to your user.
 - **Idea:** Assign this to all administrators managing the wallet for streamlined access.



Troubleshooting

- **If installation fails:**
 - Verify org limits and storage availability.
 - Confirm user permissions.
 - Review installation logs in AppExchange status or Salesforce Setup.
- **If FSC features are unavailable:**
 - Check package installation status in **Setup > Installed Packages**.
 - Ensure user permissions are correctly assigned.



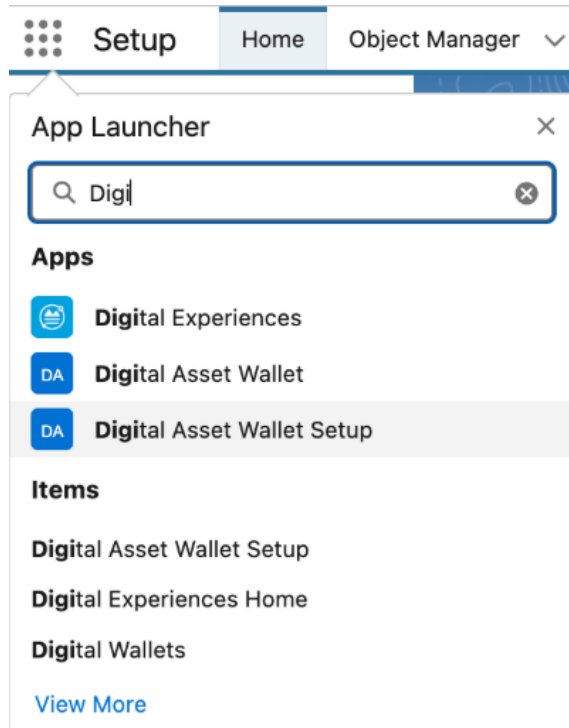
Administrators Guide


Post-Installation Setup and Authorization

After installing the Digital Asset Wallet from the AppExchange, administrators must complete the post-installation setup to authorize the org and configure the integration user. Follow these steps by navigating to the app setup interface.

- **Step 1: Navigate to Digital Asset Wallet Setup**
 - Log in to your Salesforce org.

From the App Launcher, search for and select **Digital Asset Wallet Setup**.



- **Step 2: Access Post Install Manual Steps**
 - Within the **Digital Asset Wallet Setup** app, click the **Post Install Manual Steps** tab.
 - Proceed to complete all Steps to Setup and Configure your Org and Authorize with the Connected App.
- **Step 3: Authorize and Configure Permission Sets**
 - Follow the guide under **Web3 Enabler One Time Setup: Authorization and Authentication**.
 - Create a new Permission Set named "Web3 Enabler Integration Access" without a license:
 - In Salesforce Setup, go to **Users > Permission Sets**.
 - Click **New**, name it "Web3 Enabler Integration Access," and save.
 - Go to **Connected Apps Access**, add the MuKn Web3 CA connected app, and save.
 - Assign this permission set to your user.
 -  **Note:** This step ensures proper communication with blockchain data.
- **Step 4: Create the Integration User**
 - Under **Step 2: Create the Integration User**, create a Salesforce Integration User:
 - In Salesforce Setup, go to **Users > Users**.

- Click **New User**, enter reasonable names and logins (e.g., integration.user@yourdomain.com), and assign the "Salesforce Integration" profile.
 - Use an email you can monitor and enable the user.
 - Assign the "Web3 Enabler Integration Access" permission set to this user.
 - 💡 **Idea:** This user provides a clear audit trail for sensitive Web3 data.
- **Step 5: Authorize the Org**
 - Return to the **Post Install Manual Steps** tab and click **Authorize My Org**.
 - Use the Integration User's credentials (username/password) to log in and authorize.
 - After authorization, refresh the **Web3 Enabler Setup** tab to verify success.

Digital Asset Wallet...
Post Install Manual Steps
Digital Asset Wallet Setup
Advanced Setup

⚠️ WARNING: If you have not completed the Post Install Setup, the authorization will succeed, but you will get strange error messages and data will not flow properly. Please complete the Post Install Setup first.

Web3 Enabler Setup

From this screen Web3 Enabler for Salesforce is Connected to the Web3 Enabler System

Authorization Status

Organization Information

Web 3 Enabler Organization Id	6135bb0c-616d-49c3-a232-038ebc5c798c
Salesforce Organization Id	00DOy000001E3J
Salesforce Organization URL	https://nosoftware-page-632-dev-ed.scratch.my.salesforce.com
Web 3 Enabler API Key	Web 3 Enabler API Key is set
Authorized	✓

Connect to MuKn Web3 Enabler

Re-authorize My Org

Verify My Org

Digital Asset Wallet User

This section is designed for end users, such as financial advisors and planners, to set up and utilize the Digital Asset Wallet within the Salesforce Financial Services Cloud environment. It provides step-by-step instructions to access the app, configure it for individual use, and explore its key features for managing digital assets and transactions.

Initializing Crypto Investment Assets

Digital Asset Wallet...
Post Install Manual Steps
Digital Asset Wallet Setup
Advanced Setup

Digital Asset Wallets Advanced Setup

On this screen you can configure advanced Digital Asset Wallets features for Salesforce.

Asset Tokens & Contract Tokens

☐ Reinitialize Asset Tokens & Contract Tokens
 Optional. If Asset Tokens or Contract Tokens records have been deleted/changed, you can refresh them.

CoinGecko Pro Setup

☐ CoinGecko Pro Credentials
 Optional. The CoinGecko API is used for Cryptocurrency to Fiat exchange rates. The limits of the Free API should be sufficient for all normal operations. If you have or register for a CoinGecko Account, you can use your API Key here to get more precise and up to date exchange rates. [More information.](#)

CoinGecko API Key

Enter your CoinGecko API Key (optional)

- If available, a paid API Key can be obtained from **CoinGecko** to get premium usage of their Pricing API in order to get higher usage of of to date asset pricing and market pricing for all initialized assets and Crypto Holdings.

Using Digital Asset Wallet App

- Navigate to the **Digital Asset Wallet** app to view the initialized Crypto Assets as Financial Securities utilizing the native FSC objects.

Digital Asset Wallet
Welcome
Crypto Accounts
Financial Accounts
Securities
Reports

Securities

All

10 Items • Sorted by Securities Name • Updated a few seconds ago

Search this list...

	Securities Name	Symbol	Price	CUSIP
1	Binance Coin	BNB	\$644.14	
2	Bitcoin	BTC	\$104,599.00	
3	Chainlink	LINK	\$13.07	
4	Ethereum	ETH	\$2,521.62	
5	LEO Token	LEO	\$9.17	
6	Lido Staked Ether	STETH	\$2,520.40	
7	Shiba Inu	SHIB	\$0.00	
8	Tether	USDT	\$1.00	
9	USD Coin	USDC	\$1.00	
10	Wrapped Bitcoin	WBTC	\$104,597.00	

Creating Crypto Account

- A single **Crypto Account** is a place that holds a Blockchain Connection to a specific wallet or Address to manage Digital Assets for various wallets and networks.
- Wallets can be connected through EVM style Wallets and UTXO Wallets such as Bitcoin, Doge, Litecoin, and Dash.
- When connecting a single EVM Wallet it is connected with a single account address such as a Metemask Address or any of your favorite EVM compatible Crypto wallets.
- UTXO Wallets are similar as they use a Mater Public Key Address which is used to derive UTXO Addresses with a **Herilistically Deterministic (HD)** Wallet.
 - A **Heuristically Deterministic (HD)** wallet is a cryptocurrency wallet that generates a hierarchical tree of private and public keys from a single seed phrase, enabling secure, organized key management and simplified backups.

- Crypto Accounts are related to a **Financial Account** using FSC so that many different Crypto Wallets and networks can be rolled up to manage all Assets and Financial Holdings.

Details

Information

Crypto Account Name

My Financial Holdings

Financial Account

[Web3 Enabler](#)

Connect Crypto Account ⓘ

[Connect Wallet](#)

Wallet Address

Master Public Key

System Information

Created By

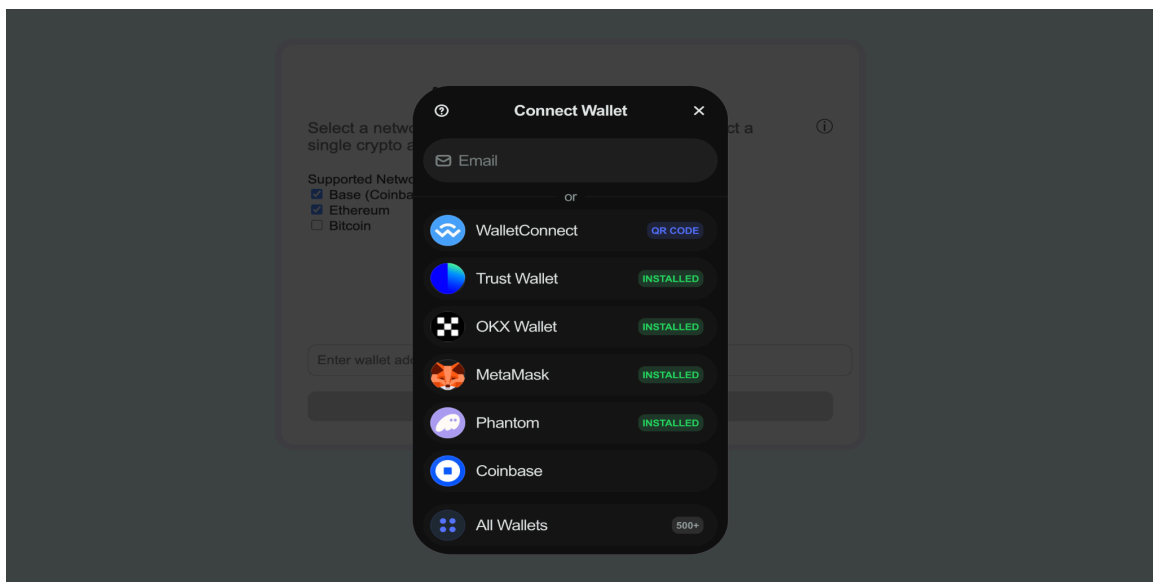
[User User](#), 6/18/2025, 2:33 PM

Last Modified By

[User User](#), 6/18/2025, 2:33 PM

Connecting Crypto Account

- Connecting a Wallet to a **Crypto Account** is easy with Wallet Connect or by manually entering your wallet Address or Master Public Key. Once connected any Digital Assets in all **Crypto Accounts** will roll up to reflect all assets for all different associated wallets and types.
- As soon as a Crypto Account is successfully connected with your preferred wallet, all valid Assets and Networks that are configured in Salesforce will be pulled and updated with the current Market Price for each unique asset as a FSC Financial Holding object related to the specific Financial Account.



Details

Information

Crypto Account Name

My Financial Holdings

Financial Account

[Web3 Enabler](#)

Connect Crypto Account

Crypto Account Connected

Wallet Address

0x8F5A5731fFA234D16172B86ceDF1572C0567e196

Master Public Key

Connected Blockchains

Ethereum;Base (Coinbase)

System Information

Created By

User User, 6/18/2025, 2:33 PM

Last Modified By

User User, 6/18/2025, 2:40 PM

View all Financial Holdings

- Navigate to the specific Financial Account associated with your connected Crypto Account.
- Direct to the **Related** Tab for the Financial Account and all assets will be rolled up into **Financial Holding** objects for all connected wallets for the Account.
- All **Financial Holdings** will be created with the current Asset Price and Market Value for the particular Holding.

Digital Asset Wallet

Welcome

Crypto Accounts

Financial Accounts

Securities

Reports

Financial Account

Web3 Enabler

New Opportunity (Wallet Share)

New Case

Edit

Related

Details

Revenues (0)

New

Financial Holdings (1)

New

Financial Holding Name	Symbol	Gain/Loss	Market Value
USDT Assets			\$5.39

View All

Notes & Attachments (0)

Upload Files

Upload Files

Or drop files

Opportunities (0)

New

Activity

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Crypto Accounts (1)

My Financial Holdings

Wallet Address: 0x8F5A5731fFA234D16172B86ceDF1572C0567e1...

Master Public Key:

View All



Financial Holding
USDT Assets

Related

Details

Financial Holding Name

USDT Assets



Symbol



Financial Account

[Web3 Enabler](#)

Asset Class



Asset Category



Asset Category Name



Household



Security

[USDT](#)



▾ Financials

Market Value

\$5.39



Shares

5.3923



Price

\$1.0000



Last Updated



Percent Change



Gain/Loss ⓘ



Created By

[User User](#), 6/18/2025, 2:40 PM

Last Modified By

[User User](#), 6/18/2025, 2:40 PM